GLOSSARY CONTROLLED VOCABULARY

Canonical Definitions for SIG Documentation

February 2026

Editorial Office

Standard Index Group
1 Lombard Street
London EC3V 9AA
United Kingdom

INTRODUCTION CORE TERMS

GLOSSARY & CONTROLLED VOCABULARY Canonical Definitions for Standard Index Group Documentation February 2026 | Version 1.0 Editorial Office, Standard Index Group

---

PURPOSE This glossary establishes canonical definitions for terminology used across Standard Index Group documentation. All published standards, protocols, and working papers use these definitions consistently. Terminology control prevents semantic drift across multi-year publication cycles.

CORE FRAMEWORK TERMS Access Register (P-01) Primary Instrument documenting all access credentials and Designated Places. Contains metadata only (pointers), not secrets themselves. See also: Pointer Principle, Designated Place Designated Place (DP) Physical or digital location where sensitive information (credentials, documents, keys) is stored. Referenced by code (DP-01, DP-02, etc.). Never contains its own access method (circular dependency prohibited). Defined in: TN-01 Digital Asset Electronic record, file, account, or property stored in digital form. Includes cryptocurrency, cloud storage, email accounts, domain names, social media profiles, digital media, and online business assets. Defined in: LP-01 Estate All property, assets, rights, and obligations of an individual. Includes physical property, financial assets, digital assets, and legal instruments. Executor Person or entity appointed to administer estate upon death. Also: Personal Representative (England/Wales), Administrator (if intestate). Instrument Formal document serving defined purpose within estate framework. P-Series = Primary Instruments (10 standard types). R-Series = Registry Instruments (4 standard types). S-Series = Security Instruments. Defined in: TN-02 Legacy Volume (L-VOL) Bound physical archive of complete estate documentation. Museum-grade preservation. SENRA product (£15,000). Designed for century-scale custody. Defined in: WP-05 Pointer Principle Separation of information from access. Documents contain references (pointers) to locations where secrets are stored, not the secrets themselves. Enables safe document sharing. Defined in: WP-01, TN-02 Primary Instrument (P-Series) One of ten standard estate documentation instruments (P-01 through P-10). Inventory-focused, pointer-based, designed for safe sharing. Defined in: TN-02 Principal Individual whose estate is being planned/documented. Also: Testator (if will context), Grantor (if trust context). Registry (R-Series) Meta-instrument tracking other instruments. Four standard registries: R-01 (Master Registry), R-02 (Renewal Registry), R-03 (Authority Registry), R-04 (Designated Place Registry). Defined in: TN-02

TECHNICAL TERMS

TECHNICAL & OPERATIONAL TERMS 72-Hour Drill Operational stress test where executor attempts to locate all documents, access all Designated Places, and identify all obligations within 72 hours. Passing score: 350+/500. Defined in: AUD-10 Alkaline Reserve Calcium carbonate content in archival paper (minimum 2%) that buffers against environmental acidity. Extends paper lifespan to 200+ years. Defined in: TN-04 Apostille International authentication under Hague Convention. Makes documents acceptable in 100+ countries. Required for cross-border estate administration. Defined in: WP-03 Archival Paper Paper meeting ISO 9706 standard. Specifications: 160-200 GSM, pH 7.0-8.5, alkaline reserve 2%+, 100% cotton or lignin-free wood pulp. Lifespan: 200-500 years. Defined in: TN-04 Circular Dependency Failure mode where Designated Place access method is stored within that same Designated Place. Example: Safe combination stored inside safe. Always prohibited. Defined in: TN-01, CR-01 Cross-Border Transfer Movement of personal data between jurisdictions with different data protection laws. Requires transfer mechanisms (SCCs, adequacy decisions, BCRs). Defined in: LP-02 Data Minimization GDPR principle (Article 5(1)(c)): Collect only data necessary for specified purpose. Foundational to Redaction-First Protocol. Defined in: PP-01, LP-02 DIN Industrial Aesthetic Diagram style: Sharp corners (no rounding), monospace labels, blueprint aesthetic, black-on-white only. Specified in ADM-02. Endowment Shelf (E-01) SENRA 100-year physical custody lease (£50,000 one-time). Includes climate-controlled vault, annual inspection, perpetual institutional commitment. Defined in: WP-05 Forced Heirship Civil law requirement that minimum portion of estate must pass to specific relatives (spouse, children). Overrides testamentary freedom. Conflicts with common law wills. Defined in: WP-03 GSM (Grams per Square Meter) Paper weight measurement. Archival standard: 160-200 GSM. Standard copy paper: 80 GSM (inadequate for longevity). Defined in: TN-04 Hash Line Document control footer containing: [Left: Doc code/title] | [Center: Page X of Y] | [Right: Issuer | Class]. Specified in ADM-01. Legitimate Interest GDPR lawful basis (Article 6(1)(f)). Balances processor needs with data subject rights. Requires Legitimate Interest Assessment (LIA). Defined in: LP-02 PDF/A Archival PDF format (ISO 19005). Embeds fonts, no external dependencies. Designed for long-term digital preservation. Standards: PDF/A-1b, PDF/A-2b, PDF/A-3. Defined in: WP-05 Pigment Ink Archival-grade ink. Lightfast, water-resistant, 100+ year lifespan. Contrasts with dye-based ink (fades 5-15 years). Required for archival documents. Defined in: TN-04

PRIVACY LEGAL TERMS

PRIVACY, SECURITY & LEGAL TERMS Redaction-First Protocol (PP-01) Privacy framework: Share only task-necessary information. Systematic redaction of account numbers, balances, credentials before providing documents to assistants/bureau. Defined in: PP-01 Need-to-Know Basis Privacy principle: Assistant receives minimum information required for assigned task. Account names: yes. Account numbers: no. Defined in: PP-01 Pointer Preservation Redaction principle: DP references must remain visible even when surrounding content redacted. Example: Redact balance, preserve "Access: DP-01". Defined in: PP-01 GDPR (General Data Protection Regulation) EU Regulation 2016/679. Dominant privacy framework. Extraterritorial application. Penalties up to 4% global revenue. Governs personal data processing. Defined in: LP-02 Standard Contractual Clauses (SCCs) EU Commission-approved contract templates for cross-border data transfers. Alternative to adequacy decisions. Four modules: Controller-Controller, Controller-Processor, Processor-Processor, Processor-Controller. Defined in: LP-02 RUFADAA Revised Uniform Fiduciary Access to Digital Assets Act (US). Grants executors authority to access digital assets unless will restricts. Adopted by 48 US states. Defined in: LP-01 Recovery Phrase 12-24 word mnemonic for cryptocurrency wallet recovery. Must be stored physically (never digital). Loss = permanent inaccessibility. Defined in: LP-01 Transfer Impact Assessment (TIA) Post-Schrems II requirement: Assess if destination country law undermines SCC protections. Required for all cross-border transfers. Defined in: LP-02

INSTITUTIONAL TERMS

INSTITUTIONAL & ORGANIZATIONAL TERMS SENRA Stewardship & custody entity. Established 2019, 100-year horizon (2020-2120). Division 6 of Engadin Group. Services: N-01, E-01, L-VOL, Family Constitutions. Defined in: WP-06 Standard Index Group (SIG) Standards-issuing entity. Parent organization defining P-Series, R-Series, S-Series frameworks. Issues TN, PP, AUD, LP series documents. Engadin Institute Research entity. Issues working papers (WP-series) focused on cross-border, taxonomy, privacy. Affiliated with Engadin Group. Engadin Foundation Patronage & archive entity. 100-year standards (WP-05), long-horizon preservation focus. Affiliated with Engadin Group. Editorial Office Quality control entity within Standard Index Group. Issues ADM-series documents. Manages errata, version control, library index. Bureau Service (SIGNUM) Document processing service operating under Redaction-First Protocol. Tiered services: formatting, redacted updates, supervised work. Standard Index Group branded. Defined in: PP-01 Non-Executive Custody (N-01) SENRA service (£2,500/year). Ledger entry + dossier. Client retains physical documents. SENRA maintains registry + annual verification. Defined in: WP-06 Family Constitution Multi-generational governance document. Defines decision-making, wealth transfer, conflict resolution for families. 75-100 year lifespan typical. Requires archival-grade materials. Defined in: WP-05

DOCUMENT CLASSIFICATION

DOCUMENT SERIES CODES & CLASSES ES-SERIES Engadin Standards. Versioned, stable, hashed technical specifications. Example: ES-2026 (P-Series Standard) Issuer: Standards Working Group TN-SERIES Technical Notes. Implementation guidance, operational frameworks. Example: TN-01, TN-02, TN-04 Issuer: Standards Working Group, Research Secretariat WP-SERIES Working Papers. Research, methodology, conceptual frameworks. Example: WP-01 through WP-06 Issuer: Named authors (research context) PP-SERIES Privacy Protocols. Data handling, privacy-preserving workflows. Example: PP-01 Issuer: Privacy Office AUD-SERIES Audit Frameworks. Testing protocols, verification procedures. Example: AUD-10 Issuer: Audit Office LP-SERIES Legal Papers. Legal analysis for academic publication (SSRN). Example: LP-01, LP-02 Issuer: Named authors (legal research) ADM-SERIES Administrative Documents. Internal control, quality assurance. Example: ADM-00, ADM-01, ADM-02 Issuer: Editorial Office EB-SERIES Errata Bulletins. Corrections and clarifications to published docs. Example: EB-01 Issuer: Editorial Office CR-SERIES Case Reports. Anonymized composites, failure analysis, remediation. Example: CR-01 Issuer: Audit Office GLO-SERIES Glossaries. Controlled vocabulary, canonical definitions. Example: GLO-01 (this document) Issuer: Editorial Office

DEPRECATED PROHIBITED TERMS

DEPRECATED TERMS (Do Not Use) The Zurich Ten -> Use: "The Standard Ten" (nomenclature evolved 2021) Reason: Naming standardization (TN-02) Register -> Use: "Registry" (for R-Series) Reason: Terminology consistency (Registry = meta-instrument) Membership -> Use: "Custody instrument" or "Enrolment" Reason: Avoids social/club connotations (institutional posture) Client -> Prefer: "Principal" (estate planning context) Reason: Clarity (principal = estate owner, not advisor's client)

PROHIBITED CLAIMS (Never Use) "Guaranteed" -> Prohibited (overreach) "Eliminates all risk" -> Prohibited (absolute claim) "Adopted by [specific institution]" -> Prohibited (unless true) "Endorsed by [authority]" -> Prohibited (affiliation claim) "AI-powered" / "Blockchain-based" -> Prohibited (tech hype) See: ADM-02 (Style + Claims Discipline Checklist)

CITATION FORMAT Internal cross-references: Format: "See TN-01 (Designated Place Framework)" NOT: "See TN-01" (provide title for reader clarity) External citations: Format: ISO 9706:1994, GDPR Article 5(1)(c), etc. Maximum: 2-4 per document (ADM-02 guideline)

VERSION CONTROL This glossary (GLO-01 v1.0) represents canonical definitions as of February 2026. Future versions will incorporate:

- New terms from subsequent publications
- Deprecated term updates
- Clarifications from errata bulletins

Review frequency: Quarterly Next review: May 2026 Maintained by: Editorial Office

CONTACT To suggest additions or corrections: standards@standardindex.group Subject: "Glossary Amendment Proposal: [term]" Editorial Office reviews quarterly. Accepted amendments published in next GLO-01 version.

FOOTER: GLO-01: Glossary & Controlled Vocabulary v1.0 | Page X of 6 | Standard Index Group | Reference